



# **School Committee Meeting** **Fair Student Funding Year 2 Update**

**March 2021**

# We implemented Fair Student Funding (FSF) to help us accomplish three goals with our funding system

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## Equity

An equitable system ...

- Distributes resources equitably based on student need.
- Allocates similar funding levels to students with similar characteristics, regardless of which school they attend.



## Transparency

A transparent system ...

- Includes clear and easily understood rules for where, how, and why dollars flow.
- Makes it clear to all stakeholders who gets what and *why* (Note: the *why* is often the missing piece).



## Flexibility

**\*Site-based  
Budgeting**

A flexible system ...

- Balances local autonomy and accountability in a way that is in alignment with district strategy.
- Reduces barriers to a school's ability to maximize spending power, e.g., blending general and non-general funds where possible.

# In our 2<sup>nd</sup> year of using a Fair Student Funding formula, we also want to ensure financial stability & sustainability



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## Flexibility

A flexible system ...

- Balances local autonomy and accountability in a way that is in alignment with district strategy.
- Reduces barriers to a school's ability to maximize spending power, e.g., blending general and non-general funds where possible.



## Stability & Sustainability

A stable and sustainable system ...

- Provides predictable allocations to support school and district multi-year strategic plans.
- Is in alignment with the district's financial outlook and supports overall district strategy.

# We are projecting a ~260 student decline in enrollment in the upcoming school year

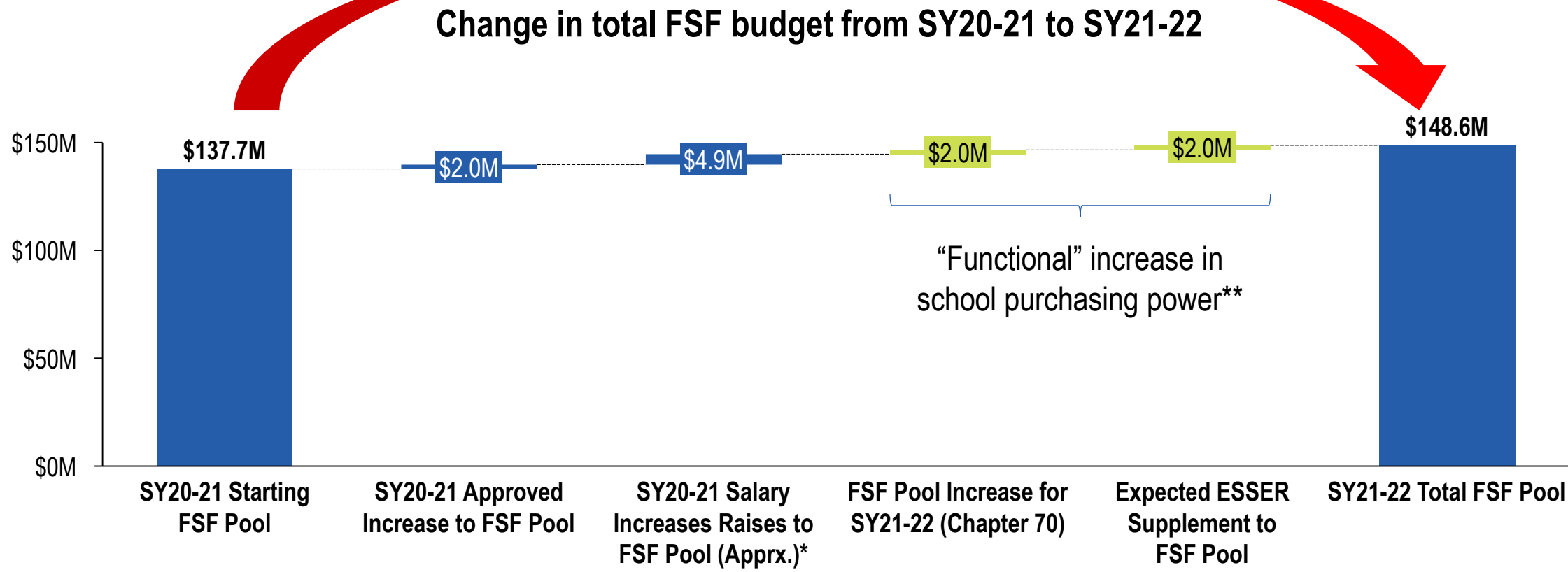
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Projected Enrollment Change by School Level

School Level	SY20-21	SY21-22 (Projected)	Change
PK	115	103	-12
ES	5,317	5,266	-51
K8	1,851	1,843	-8
MS	3,922	3,820	-102
HS	3,165	3,058	-107
SPED	120	136	16
Total	14,489	14,226	-263

Note: School-by-school enrollment change in the appendix

# The FSF pool of dollars will increase by ~\$4M in “real” terms from SY20-21 to SY21-22



# Action Items: The School Committee needs to vote on two decisions—the FSF pool increase and ESSER

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- **Decision #1: FSF Pool**

- We are proposing increasing the FSF pool by \$2M as part of Chapter 70 state funding
- The initial (from Governor's Budget) Ch70 increase is \$10.3 million. Of this amount, we need to replenish accounts and meet our contractual increase obligations. The \$2 million increase is due to our commitment to allow schools to make their own spending choices per FSF.

- **Decision #2: ESSER Supplement**

- We are proposing allocating \$2M of our ESSER II federal government stimulus schools using the FSF formula
  - This methodology ensures that we are allocating ESSER dollars following the same principles of Equity, Transparency and Flexibility driving our FSF formula
  - With the additional ESSER supplement, we are proposing increasing the \$pp gain cap to be 4% (up from 3%) for the increased allocations to flow to schools
  - Per the discussion regarding limitations due to windows of time, making this decision is limited by time constraints. Despite not having presented our plans for ESSER, we still must request an early decision to allocate \$2 million to schools since the workbooks have to be released on March 5<sup>th</sup> for the schools to have time to plan.

# WHY NOT MORE?????

- The \$10.3 million in additional Chapter 70 funds are earmarked for replenishing accounts such as health insurance (used ESSER I to fund) and contractual increases such as step increases, transportation rate increases and raises to out of district tuition rates. We are still committed to increasing the amount of investments directly to schools to empower them to make their own decisions.
- The \$17.9 million in ESSER II funds must cover two years of addressing learning loss such as extended learning time, professional development for staff and districtwide support for schools. We are committed to increasing the amount of investments directly to schools to empower them to make their own decisions by using \$2 million of ESSER II funds both years.

# With increases in budgets, we need to continue to support 7 key principles for an effective school funding system

Principle	Description
<b>Student-Focused</b>	Provides resources based on students, not on buildings, adults, or programs
<b>Equitable</b>	Allocates similar funding levels to students with similar characteristics, regardless of which school they attend
<b>Transparent</b>	Easily understood by all stakeholders
<b>Differentiated</b>	Allocates resources through a comprehensive framework that is based on student needs
<b>Predictable</b>	School allocation process is predictable and is structured to minimize school-level disruption
<b>Empowering</b>	Empowers school-based decision-making to effectively use resources
<b>Aligned with District Strategy</b>	Supports the district's multiyear strategic plan

Budget increases should **support student needs**, especially in the context of COVID-related recovery needs

Budget increases also need to be aligned with **short-term and long-term district strategy** and financial sustainability

# Key considerations and watch-outs as we increase school budgets

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## Key Considerations

1. **Timing:** the bigger the increase, the more time and support schools need for strategic planning
2. **Cost structure limitations:** District-level changes in cost structures and policies required for schools to effectively use large increases to meet student needs. (e.g., Has the district worked to provide enabling conditions for schools to be able to extend the school year in coming years?)



## Watch-outs

1. **Across-the-board class size reductions:** Without guidance on strategic investments, schools are likely to add teachers/aides and reduce class sizes without changing their approach to service delivery. Incremental class size reductions, while costly, generally are not linked to any change in student achievement.
2. **Long-term sustainability:** Using one-time funds (such as ESSER supplement) to add staff in schools may create sustainability challenges in future years

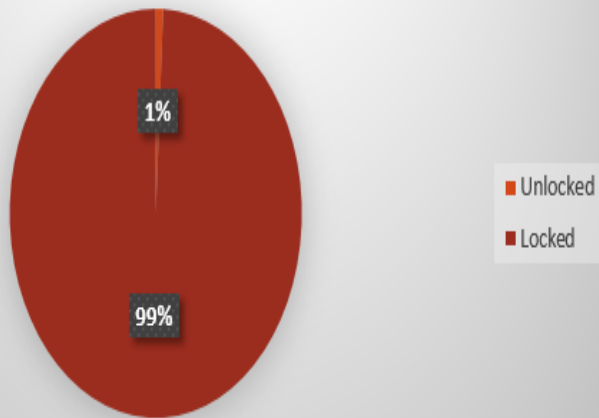
# As a district, LPS has strategic opportunities to leverage one-time funding increases

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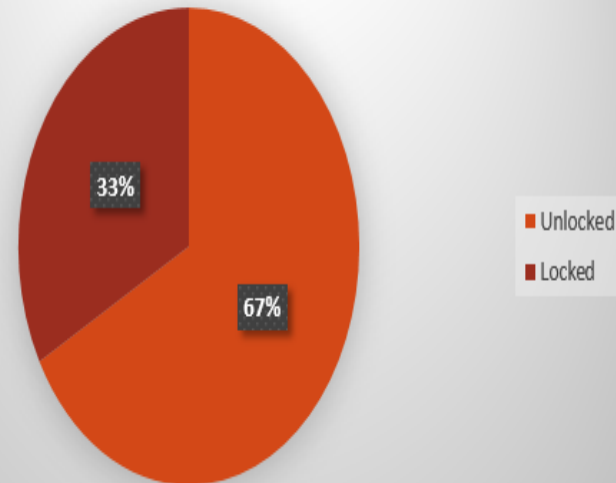
- Allocating more resources to **schools with the most significant COVID-19 recovery needs** and providing them with guidance on how to use it
- Developing **need-targeted models from the district level for all principals** to use.
  - E.g., options for increased investment in tutoring, opportunities in extended time,
  - E.g., options for investing into social-emotional supports through community partners
- Use new funds to **pilot truly innovative models** that could ultimately replace old ones
  - E.g., A new grade 10-12 model that is integrated with UMass Lowell, many courses offered online across schools or even district or state lines, with more mastery-based and career-focused course content
- Deeper districtwide investments into **early literacy**

# Empowering and Investing in Schools

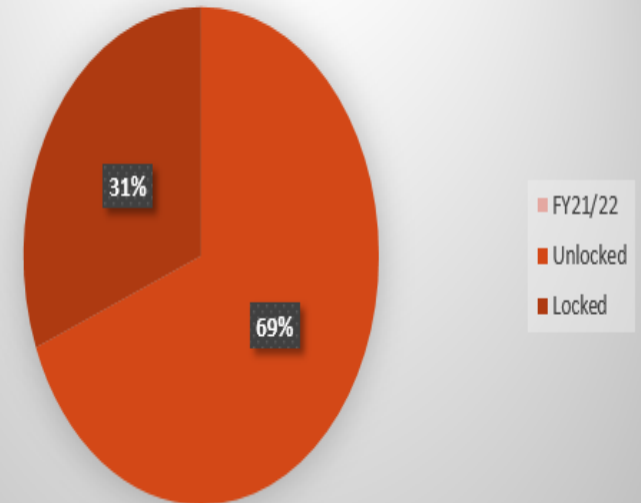
FY19/20 Locked vs. Unlocked



FY20/21 Locked vs. Unlocked



FY21/22 Locked vs. Unlocked



# This year, we have added a new weight, increasing the equity-based student characteristics in the FSF formula

Category	Weight	Measured by...	SY20-21	SY21-22
		Base weight:	\$4,500 per pupil	\$5,300 per pupil
Students from Low-income Families	Economically disadvantaged: Elementary grades	State direct certification reports	+0.35x base weight	+0.35x base weight
	Economically disadvantaged: Secondary grades	State direct certification reports	+0.35x base weight	+0.35x base weight
<b>NEW</b> Students Experiencing Homelessness	Homeless students	% of Homeless Students in each School	N/A	+0.20x base weight
Performance Needs	Low incoming performance	5 <sup>th</sup> and 9 <sup>th</sup> graders' MCAT performance*	+0.20x base weight	+0.20x base weight
English Learners	ELL Levels 1-3	ACCESS levels	\$2,750 per pupil	\$3,000 per pupil
	ELL Levels above 3	ACCESS levels	\$1,400 per pupil	\$1,500 per pupil
Students with Disabilities (SWD)	SWDs in substantially separate settings	Individual Education Plans	\$22,500 per pupil	\$23,000 per pupil
	SWDs in inclusion settings	Individual Education Plans	\$6,250 per pupil	\$6,500 per pupil
Priority Grades	Grades PK-3	Enrollment projections	+0.35x base weight	+0.35x base weight
	Grade 9	Enrollment projections	\$3,750 per pupil	\$4,000 per pupil

\*Using Fall SY19-20 Data in both years because of limited assessment data availability

# Combining these weights with additional policies will help us continue to prioritize equity while maintaining stability

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## Weights:

- **Base weight**- minimum that a school will receive per student
- **Student Need Weights**- add'l funding based on the needs of students

## Policies:

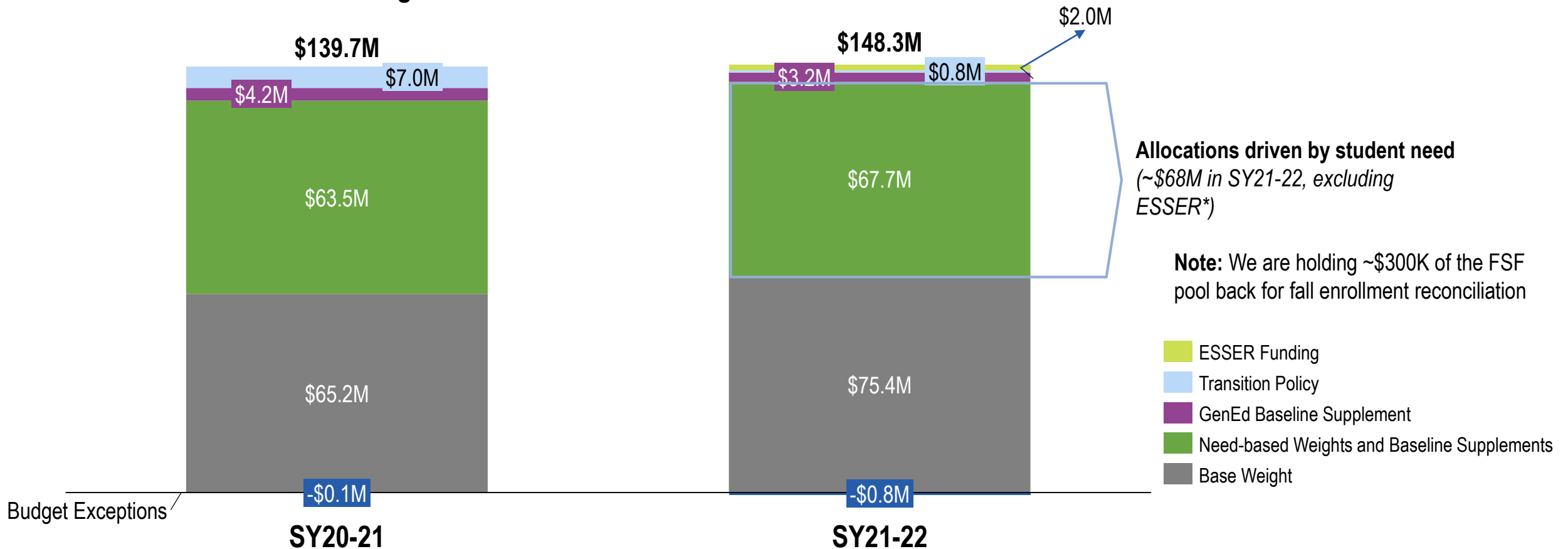
- **Baseline Services** ensures all schools are able to provide a minimum level of services (*see appendix for details*)
- **Transition policy** ensures schools do not see large swings year over year
  - No school allowed to lose on a total budget, per pupil or FTE amount basis
  - School gains capped at 3%-4% gain per pupil

Equity

Stability

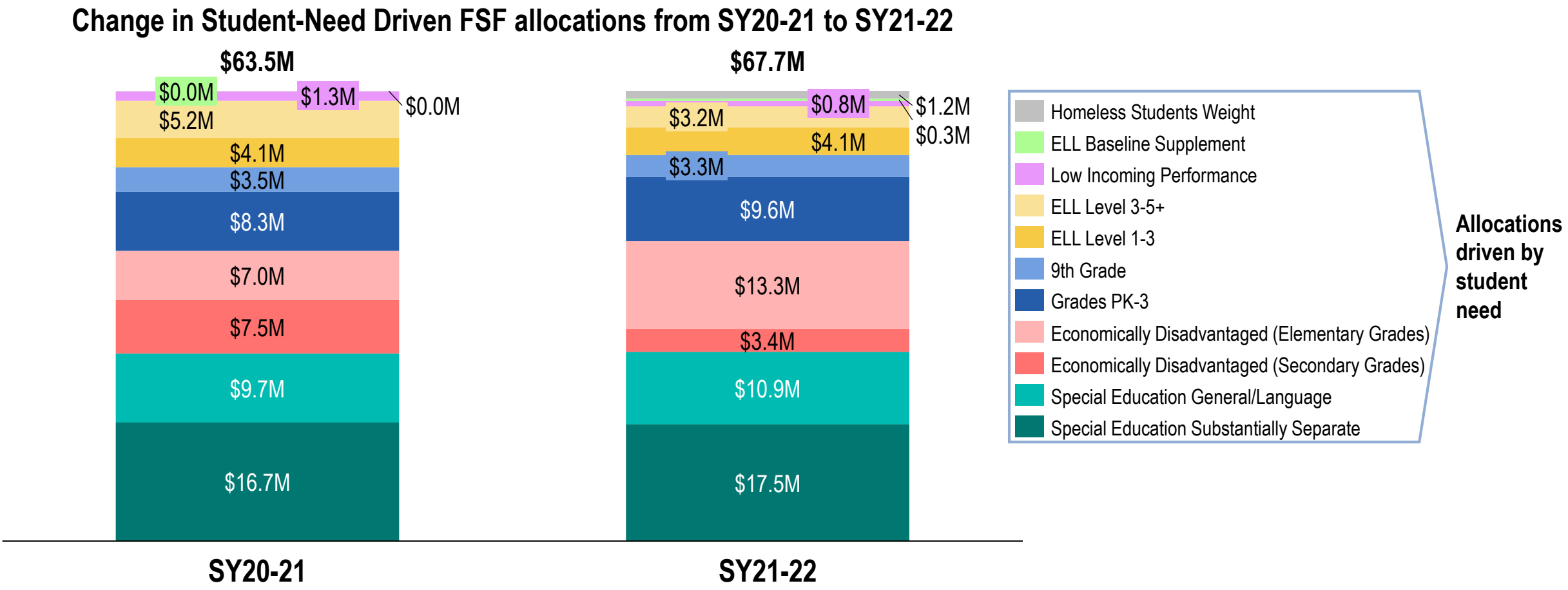
# ~46% of FSF dollar allocations will be driven by student need

Change in FSF allocations from SY20-21 to SY21-22




\*We are allocating \$2M of ESSER supplements proportional to the FSF formula dollars each school receives. As a result, ESSER supplements will be allocated partially based on student need.

# We see variation across allocations driven by student need, as determined by changes in projected enrollment



# Detailed view: School-by-school changes in enrollment and FSF budget allocations

School Information		Enrollment Change				Budget Change					
School Name	School Level 	SY20-21 Enrollment	SY21-22 Projected Enrollment	Year-to-Year Enrollment	Year-to-Year Enrollment	SY20-21 Final Budget (w/ 3.5%)	SY21-22 Proposed Budget	Year-to-Year Budget Change	SY20-21 \$PP (w/ 3.5% increase to	SY21-22 \$PP	\$PP Change
Cardinal O'Connell Early Learning	PK	115	103	-12	-10%	\$1,914,021	\$1,936,281	\$22,259	\$16,644	\$18,799	\$2,155
Bailey Elementary School	ES	489	479	-10	-2%	\$4,721,885	\$4,878,685	\$156,800	\$9,654	\$10,185	\$531
Rogers STEM Academy	K8	872	862	-10	-1%	\$7,752,202	\$8,086,866	\$334,664	\$8,895	\$9,382	\$486
McAvinnue Elementary School	ES	472	465	-7	-1%	\$4,878,106	\$5,071,517	\$193,411	\$10,339	\$10,906	\$567
Greenhalge Elementary School	ES	471	461	-10	-2%	\$5,184,299	\$5,341,374	\$157,075	\$11,000	\$11,586	\$586
Pyne Arts Magnet School	K8	506	498	-8	-2%	\$5,174,195	\$5,245,603	\$71,409	\$10,228	\$10,533	\$306
Lincoln Elementary School	ES	505	503	-2	0%	\$4,718,590	\$4,959,384	\$240,793	\$9,342	\$9,860	\$518
Moody Elementary School	ES	203	227	24	12%	\$2,258,708	\$2,558,696	\$299,988	\$11,132	\$11,272	\$140
Morey Elementary School	ES	498	494	-4	-1%	\$4,723,676	\$4,943,002	\$219,326	\$9,487	\$10,006	\$519
Pawtucketville Memorial Elementary	ES	497	492	-5	-1%	\$4,697,965	\$4,911,189	\$213,224	\$9,462	\$9,982	\$520
Reilly Elementary School	ES	489	487	-2	0%	\$4,749,204	\$4,819,298	\$70,094	\$9,710	\$9,896	\$186
Shaughnessy Elementary School	ES	478	460	-18	-4%	\$4,743,357	\$4,813,074	\$69,716	\$9,915	\$10,463	\$548
Washington Elementary School	ES	239	236	-3	-1%	\$3,068,828	\$3,111,585	\$42,757	\$12,867	\$13,185	\$317
McAuliffe Elementary School	ES	490	485	-5	-1%	\$4,684,131	\$4,869,893	\$185,762	\$9,552	\$10,041	\$489
Murkland Elementary School	ES	486	477	-9	-2%	\$4,887,668	\$5,052,519	\$164,851	\$10,065	\$10,592	\$527
Bartlett Community Partnership	K8	473	483	10	2%	\$5,375,060	\$5,559,458	\$184,398	\$11,357	\$11,510	\$154
Butler Middle School	MS	571	549	-22	-4%	\$5,028,020	\$5,095,699	\$67,679	\$8,806	\$9,282	\$476
Daley Middle School	MS	696	691	-5	-1%	\$6,083,374	\$6,368,692	\$285,318	\$8,740	\$9,217	\$476
Robinson Middle School	MS	673	642	-31	-5%	\$5,842,032	\$5,880,852	\$38,820	\$8,681	\$9,160	\$480
Sullivan Middle School	MS	647	636	-11	-2%	\$6,075,127	\$6,159,836	\$84,709	\$9,390	\$9,685	\$296
Wang Middle School	MS	684	650	-34	-5%	\$5,561,025	\$5,574,317	\$13,292	\$8,130	\$8,576	\$446
Stoklosa Middle School	MS	651	652	1	0%	\$5,799,802	\$5,888,996	\$89,194	\$8,909	\$9,032	\$123
Lowell High School	HS	3111	3003	-108	-3%	\$29,229,003	\$29,633,691	\$404,688	\$9,395	\$9,868	\$473
The Career Academy	HS	54	55	1	2%	\$1,272,691	\$1,304,062	\$31,371	\$23,568	\$23,710	\$142
<b>Totals:</b>		<b>14469</b>	<b>\$14,090</b>	<b>[279]</b>	<b>-2%</b>	<b>#####</b>	<b>\$142,064,567</b>	<b>\$3,641,597</b>	<b>\$9,920</b>	<b>\$10,083</b>	<b>\$446</b>
Laura Lee Therapeutic Day School	SPED	20	24	4	20%	\$1,033,226	\$1,042,958	\$9,732			
Adie Day School	SPED	56	59	3	5%	\$2,733,616	\$2,756,567	\$22,951			
BRIDGE Program	SPED	17	17	0	0%	\$1,042,050	\$1,044,590	\$2,539			
Leblanc Therapeutic Day School	SPED	27	36	9	33%	\$1,342,938	\$1,359,011	\$16,073			
						<b>\$144,574,800</b>	<b>\$148,267,692</b>	<b>\$3,692,892</b>			



# Appendix

## Questions asked by School Committee on 2/22/21:

- 1) Allocating funds to a Parent Summit: The Chief of Engagement is preparing an initial review of this so that we can determine costs and find the funds to cover such.
- 2) Request to have paras in all classes: Twenty five percent of our total teaching staff are currently in person. The remaining 800 teachers are hybrid. So, if were to put a para in all hybrid classes, that would require hundreds of paras. This is not only an issue of affordability but rather it is a question of whether or not we could find this many paras to hire. We are currently aiming to hire the approximate 50 plus paras that are open and have only identified 35 possibilities. We are planning to hire as many as we think we can possibly recruit rather than what we can afford.
- 3) Identify which costs are recurring: Per the next slide, only one cost is recurring. The investment in technology is one time investment that would require future replacements but not a recurring cost. The professional development costs are listed as recurring and non recurring since we will always aim to have professional development but not at this level. Since these are unprecedented times, the cost is much higher than usual due to the investment in technology.
- 4) Identify which costs impact school reopening: Per the next slide, many of the costs including digital investments, covid costs, air quality, supplemental staff and professional development impact school reopening. Other costs such as facility improvements and online registration software would not impact school reopening.

Summary of Budget Adjustments (Attachment A)

Goal 1			\$ 7,609,350.00	Improving academics and student achievement					
			\$ 4,231,000.00	Digital Learning					
NR	I		\$ 1,732,000.00	Devices for teachers, principals, social workers, central office administration					
NR	I		\$ 24,000.00	IT Device Distribution					
NR	I		\$ 110,000.00	Central Office clerical device replacement					
NR	I		\$ 110,000.00	Clerical and custodian device replacement					
NR	I		\$ 180,000.00	New student device distribution (K)					
NR	I		\$ 75,000.00	Miscellaneous (adaptors, cables, batteries, camera equipment)					
NR	I		\$ 2,000,000.00	Classroom hardware upgrades					
NR	I		\$ 270,000.00	Supplemental staff - 6 teachers & 15 paras in addition to the vacant school based positions					
NR	I		\$ 560,750.00	COVID Pool Testing - tests, admin fees, nurse, couriers, testing, sample collection					
NR	I		\$ 60,000.00	Indoor Air Quality					
NR/R	I		\$ 2,487,600.00	Professional Development					
Goal 2			\$ 1,227,317.00	Improving operational efficiency across the system					
NR			\$ 1,227,317.00	Offsets including prepurchasing supplies, replenishing revolving accounts					
Goal 3			\$ 1,600,000.00	Ensuring that every school is safe and welcoming to every student and every family					
NR			\$ 1,600,000.00	Facility improvements at every school to improve the safe and welcoming environment					
Goal 4			\$ 63,333.00	Increasing community engagement					
R			\$ 63,333.00	Registration Software					

NR=Not recurring  
R=Recurring  
NR/R= Both  
  
I= Impact reopening

# Our baseline policy ensures that all schools have enough to provide a Lowell education

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Position	Allocation
Principal	1 per school
Assistant principal	1 per 400 students
Clerk	1 per school
Classroom teachers	1 per 25 students
Allied arts teachers	1 per 120 students
PreK teachers	1 per 24 students
PreK paraprofessionals	1 per 24 students
Kindergarten teachers	1 per 24 students
Kindergarten paraprofessionals	1 per 24 students

Position	Allocation
Looper teachers	1 per 350 MS students
Guidance counselors	1 per school at K-8 and MS 1 per 250 HS students
Custodians	1 per 160 students
Instructional supplies	\$80 per PK-4 student \$90 per 5-8 student \$95 per 9-12 student

# Our special education baseline policy ensures that schools can educate students with disabilities

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Students whose IEPs require this setting ...	... must have at least one special education teacher for:
LEAP CSA Adjustment	12 students
Inclusion Resource Speech	15 students

# Our baseline policy ensures that all schools have enough to provide a Lowell education

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Students whose highest ACCESS score is...	... must have sufficient ESL-certified teachers to provide:
Below 3.0	45 minutes of ESL instruction daily
Above 3.0	2 hours of ESL instruction daily

# School-by-school: We are projecting a ~200 student decline in enrollment in the upcoming school year

**PreK & Elementary Schools Enrollment Change**

School Name	School Level	SY20-21	SY21-22 (Projected)	Change
Moody Elementary School	ES	203	227	24
Lincoln Elementary School	ES	505	503	-2
Reilly Elementary School	ES	489	487	-2
Washington Elementary School	ES	239	236	-3
Morey Elementary School	ES	498	494	-4
Pawtucketville Memorial Elementary School	ES	497	492	-5
McAuliffe Elementary School	ES	490	485	-5
McAvinnue Elementary School	ES	472	465	-7
Murkland Elementary School	ES	486	477	-9
Bailey Elementary School	ES	489	479	-10
Greenhalge Elementary School	ES	471	461	-10
Cardinal O'Connell Early Learning Center	PK	115	103	-12
Shaughnessy Elementary School	ES	478	460	-18

**K8, MS, HS & SPED Schools Enrollment Change**

School Name	School Level	SY20-21	SY21-22 (Projected)	Change
The Career Academy	HS	54	94	40
Bartlett Community Partnership	K8	473	483	10
Leblanc Therapeutic Day School	SPED	27	36	9
Laura Lee Therapeutic Day School	SPED	20	24	4
Adie Day School	SPED	56	59	3
Stoklosa Middle School	MS	651	652	1
BRIDGE Program	SPED	17	17	0
Daley Middle School	MS	696	691	-5
Pyne Arts Magnet School	K8	506	498	-8
Rogers STEM Academy	K8	872	862	-10
Sullivan Middle School	MS	647	636	-11
Butler Middle School	MS	571	549	-22
Robinson Middle School	MS	673	642	-31
Wang Middle School	MS	684	650	-34
Lowell High School	HS	3111	3003	-108